



BOWEN ISLAND  
COMMUNITY  
FOUNDATION

## Information on Donating Securities to the Bowen Island Community Foundation

In lieu of cash, you can donate securities to the Bowen Island Community Foundation. Securities include stocks, bonds and mutual funds traded on the major North American exchanges. Canada Revenue Agency has indicated that there is no capital gains tax attributed to this transaction. You will receive a charitable tax receipt from the Bowen Island Community Foundation for the value of the securities received.

### Valuation and Sale of Securities

The Bowen Island Community Foundation will issue a donation receipt to you for the value of the securities based on the last quoted trading price in normal trading hours on the date the securities are received into the Bowen Island Community Foundation's brokerage account. Please note that the market will, in all likelihood, have moved either up or down between the time you give the instructions to transfer and the time we receive the securities.

**Once the securities and the completed *Authorization and Direction Form* are received by the Bowen Island Community Foundation broker, the securities will be sold as soon as possible and the proceeds sent to the Bowen Island Community Foundation.**

We work to minimize, as much as possible, any differences in the value of securities during the transfer and sale period.

### Timing

**Please be aware that it is logistically very difficult, if not impossible, to transfer securities in the last weeks of December.** As well, certain securities such as mutual funds can take several weeks or more to transfer, depending on the complexity of the gift. Avoid this risk by planning your gift well in advance.

### Further Information

If you have any questions or require further information about making your gift, please contact us at [info@bowenfoundation.com](mailto:info@bowenfoundation.com).

Thank you for your support of the Bowen Island Community Foundation!



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# Gift of Securities Authorization & Direction Form

Donor Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Tel: \_\_\_\_\_

Account Information at Delivering Institution	
Donor Account Number	
Institution Name	
CUID#	
Address	
Contact Name	
Phone	
Fax	
Email	

Receiving Institution Information	
Raymond James Ltd. 4th Floor – 925 West Georgia St. Vancouver, BC V6C 3L2 Contact: Account Transfer Dept. Email: TransfersIn@raymondjames.ca	Account#: C03-1A0A-0 Dealer/Rep Code: 9485/1T38 FINS#: T089 DTC#: 5076 CUID#: MSLT

I hereby authorize and direct the transfer in kind, as a donation, of the following securities from the above account at the Delivering Institution to the above account at the Receiving Institution:

Security Name/Description	Security Symbol/Code	# of shares/units

It is my/our understanding that the tax receipt will be issued based on the last quoted trading price during normal trading hours on the date that the securities are received into Bowen Island Community Foundation’s brokerage account.

Signature of Donor: \_\_\_\_\_

Date: \_\_\_\_\_

Signature(s)

TO PROCESS, PLEASE SEND THIS COMPLETED FORM BY EMAIL, FAX or MAIL TO:

RGF Integrated Wealth Management

Attn: Jon Knutson

1701 West Broadway Vancouver, BC V6J 1Y3

Phone: 604-732-6551

Fax: 604-732-6553

email: [jknutson@rgfwealth.com](mailto:jknutson@rgfwealth.com)